

## EXPANDABLE FOLDER

### TECHNICAL FIELD

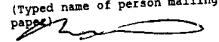
This invention relates to a professional looking storage folder for filing important legal and professional work documents, such as wills, tax returns and quarterly financial statements and reports, and in particular to a folder that can expand to accommodate multiple documents, taxpayer records, etc. of archival importance.

#### CERTIFICATE OF "EXPRESS" MAILING (37 CFR 1.10)

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Date: October 24, 2003

William R. Gustavson  
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## BACKGROUND OF THE INVENTION

Tax preparers and accountants will often produce reports for a client to advise them of their current financial condition. It is important to present these reports to clients in a professional and elegant manner to comport with the significance of the financial information. Thus, an attractive and professional appearing report folder in which to present a report is desired.

Quite often, reports will be presented on a quarterly basis, summarizing financials for a given quarter of the year. It is desirable to collect the four quarterly reports for a given year in one folder to provide a complete record for the year. It is also desirable to provide identification on the folder's front and edge to note the year, assuming that it will be placed on a shelf or in a file drawer with previous years reports, in order to distinguish one year from another.

A need exists to provide an elegant, professional looking report folder, particularly one that can hold the four quarterly reports for a given year yet provide fast, easy retrieval of folder contents in future years.

## SUMMARY OF THE INVENTION

In accordance with one aspect of the present invention, an expandable folder is provided, comprising a single, integral sheet of material including a back having a lower edge, an upper edge, and first and second side edges, a first side connected to the first side edge of said back by a first expanding side section having first, second and third side fold lines, a second side connected to the second side edge of said back by a second expanding side section having first, second and third side fold lines, a front connected to the lower edge of said back by a expanding lower section having first, second and third lower fold lines, the front having a cover portion and a fold over portion, a flap connected to said upper edge of said back by an expanding upper section having first, second, third and fourth upper fold lines, wherein the fold over portion of said front has a first tab and a second tab, the first side has a slot to receive said first tab, the second side has a slot to receive said second tab, and the cover portion of said front has a slot for receiving said flap.

## BRIEF DESCRIPTION OF THE DRAWINGS

A more complete understanding of the invention and its advantages will be apparent from the following Detailed Description when taken in conjunction with the accompanying Drawings, in which:

Figure 1 is a plan view of an expandable folder forming a first embodiment of the present invention;

Figure 2A is a perspective view of the expandable folder partially assembled with the sides folded inward;

Figure 2B is a perspective view of the expandable folder assembled with the flap open to receive documents;

Figure 2C is a perspective view of the expandable folder assembled with the flap closed; and

Figure 2D is perspective view of the expandable folder assembled showing the labeling.

## DETAILED DESCRIPTION

With reference now to the Figures, wherein like reference characters designate like or corresponding parts throughout the several views, an expandable folder 10 forming a first embodiment of the present invention is disclosed. The expandable folder 10 is designed to contain reports, particularly quarterly reports, and can expand to accommodate an increasing thickness of the reports, as will be described here after. Further, the expandable folder 10 can be assembled without the use of glue, or other separate fasteners, and with no special tools.

With reference now to Fig. 1, the expandable folder 10 can be seen to be formed by a single integral sheet of material 12. The material 12 is preferably heavy paper, such as 130 pounds stock. The material 12 is formed into a back 14, a first side 16, a second side 18, a front 20 and a flap 22. The front 20 is connected to a lower edge 24 of the back 14 by an expanding 20 and a flap 22. The front 20 is connected to a lower edge 24 of the back 14 by an expanding side section including three fold lines 26, 28 and 30. The first side is connected to a first side edge 32 of the back 14 by an expanding side section including three side fold lines 34, 36 and 38. The second side 18 is connected to a second side edge 40 of the back 14 by an expanding side section including three fold lines 42, 44 and 46. The flap 22 is connected to a top edge 48 of the back 14 by an expanding top section including four fold lines 50, 52, 54 and 56.

The first side 16 has a tab slot 58 formed therein. The second side 18 has a tab slot 60 formed therein. The front 20 is formed into two sections, a cover portion 62 and a fold over portion 64 separated by a fold line 76. The cover portion 62 has a flap receiving slot 66 therein. The fold over portion 64 is defined by having tapered tabs 68 and 70.

With reference to the Figures, the expandable folder 10 can be assembled by folding in the first and second sides 16 and 18, as seen in Fig. 2A, so that the surfaces 72 of the first and second sides 16 and 18 face away from the inner surface 74 of the back 14. The front 20 is then

folded about the fold lines 26, 28 and 30 so that the fold line 76 separating the cover portion 62 and fold over portion 64 is proximate the upper edges 78 of the first and second sides 16 and 18. The fold over portion 64 is then folded about the fold line 76 so that the tabs 68 and 70 are positioned between the first and second sides 16 and 18 and the back 14, as seen in Fig.2B. The tab 68 is slid into slot 58 and the tab 70 is slid into slot 60. The tabs 68 and 70 wedge into slots 58 and 60 due to their tapered wedge shape. By using the tabs 68 and 70 and slots 58 and 60, the first and second sides 16 and 18 are prevented from opening outward and the front 20 is held in position adjacent to the back 14 to form a pocket to receive the reports.

After the reports have been inserted within the expandable folder 10, the flap 22 can be folded over the reports and the end 80 of the flap inserted into the flap slot 66 in the front 20 to close the folder 10 over the reports. One advantage of the design is the fact that the fold over portion 64 covers the flap slot 66 when the folder 10 is assembled such that when the end 80 of the flap is inserted into the flap slot 66, the end 80 is sandwiched between the fold over portion 64 and cover portion 62 so that it does not catch on or interfere with the reports inside the folder 10. The use of the fold lines 26-30, 34-38, 42-46 and 50-56 permits the front 20 and back 14 to be spaced apart the proper distance to hold the reports and allows the expandable folder 10 to expand to the thickness required. The use of fold lines 50, 52, 54 and 56 define a label section 82 between the fold lines 52 and 54 which can be marked with labels identifying the contents of the expandable folder 10. By use of the four fold lines 50, 52, 54 and 56, the label section 82 will remain generally parallel the end of the expandable folder 10 as the folder is expanded in thickness to allow the label section 82 to be viewed easily.

In one expandable folder constructed in accordance with the teachings of the present invention, the folder was designed to accommodate a total thickness of reports therein of 1 1/4 inches. The fold lines 26, 28 and 30, fold lines 34, 36 and 38, and fold lines 42, 44 and 46 were each separated by 5/8 inches. The fold lines 50 and 52 and fold lines 54 and 56 were separated by 5/16 inches. The fold lines 52 and 54 were separated by 5/8 inches. The back 14 and cover portion 62(excluding the bottom section with fold lines 26-30) were 9 5/8 inches high and 11 5/8

inches wide. The flap 22 was four inches high(excluding the top section with fold lines 50-56). The flap slot 66 was 4 3/4 inches wide. The tab slots were 1 1/4 inches wide and the first and second sides 16 and 18 were 2 1/2 inches wide(excluding the side sections with fold lines 34-38 and 42-46). The distance from fold line 76 to flap slot 66 is 2 13/16 inches.

As can be appreciated, the expandable folder 10 can be assembled without tools or equipment. No glue or other fasteners are required to assemble the folder 10. In spite of the lack of glue or fasteners, the expandable folder 10 securely holds the reports in an attractive and presentable manner. The expandable folder 10 will readily fit on a shelf or in a drawer, with the label section 82 readily visible to indicate to the user the contents of the folder 10 and the firm name of the preparer. The exposed surface of the back 14 can also be imprinted with the preparer's firm name and personalized with an label adhered by adhesive to show the recipient's name, contents, year, etc. Preferably, the fold lines are knife cut and not scored. Clearly, if glue or other fasteners are desired, the expandable folder 10 can incorporate them.

While a single embodiment of the present invention has been illustrated in the accompanying drawings and described in the foregoing detailed description, it will be understood that the invention is not limited to the embodiment disclosed, but is capable of numerous rearrangements, modifications and substitutions of parts and elements without departing the scope and spirit of the invention.